

Appl. No. 09/916,951
Response Dated December 29, 2005
Reply to Office action dated September 30, 2005

Amendments to the Claims

This listing of claims will replace all prior versions and listings of claims.

Listing of Claims

1. (Currently Amended) A method for monitoring the efficacy of a marketing project for a product of a business, wherein the business has a number of representatives, and each representative represents particular customers of the business, the method comprising the steps of:
 - providing a customer database for storing information about the customers of the business;
 - providing a number of marketing project parameters;
 - applying the number of marketing project parameters against the information in the customer database to identify selected customers;
 - providing a customized listing of customers to at least selected representatives, wherein each of the customized listings includes a listing of the selected customers that the particular representative represents;
 - generating marketing material for the marketing project;
 - providing the marketing material to each of the representatives that receives a customized listing;
 - at least some of the representatives sending the marketing material to notifying at least some of the selected customers listed in their customized listing about the product;
 - determining which or how many of the customers that were sent the marketing material by their representative notified about the product actually purchased the product; and
 - determining a marketing project efficacy indicator by noting which or how many of the customers that were sent the marketing material by their representative notified about the product actually purchased the product.

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2. (Currently Amended) A method according to claim 1 wherein the marketing project efficacy indicator is determined by comparing the number of customers that were sent the marketing material by their representative notified about the product with the number of the customers that were sent the marketing material by their representative notified about the product and actually purchased the product.

3. (Currently Amended) A method according to claim 1 wherein the marketing project efficacy indicator is determined by comparing the number of customers that were sent the marketing material by their representative notified about the product with the number of the customers that were sent the marketing material by their representative notified about the product and did not purchased the product.

4. (Currently Amended) A method according to claim 1 further comprising the step of monitoring revenues generated from the purchase of the product by the customers that were sent the marketing material by their representative notified about the product.

5. (Original) A method according to claim 4 wherein the marketing project efficacy indicator is determined by comparing the revenues generated from the sale of the marketed product relative to a revenue goal.

6. (Original) A method according to claim 1 wherein the marketing project efficacy indicator is determined by comparing the number of products sold versus a goal.

7. (Cancel) A method according to claim 1 wherein the notifying step includes distributing marketing material to the selected customers.

8. (Currently Amended) A method according to claim [[7]] 1 further comprising the steps of;

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modifying the marketing material if the marketing project efficacy indicator is deemed to be too low.

9. (Currently Amended) A method according to claim 1 further comprising the step[[s]] of:

modifying selected marketing project parameters if the marketing project efficacy indicator is deemed to be too low.

10. (Currently Amended) A method for marketing a product to customers of a business, wherein the business has a number of representatives, and each representative represents a ~~portion of the~~ particular customers, the method comprising the steps of:

providing a customer database for storing information about the customers of the business;

providing a number of marketing project parameters;

applying the number of marketing project parameters against the information in the customer database to identify selected customers;

~~providing at least a partial~~ a customized listing to at least some of the representatives, each of the customized listings including [[of]] the portion of the selected customers that are represented by the particular representative to one or more of the representatives;

~~at least some of the representatives~~ electing to provide providing marketing material information about the product to at least some of their customers listed on their customized at least partial listing, wherein the marketing material is personalized to at least appear to be from the representative.

11. (Currently Amended) A method according to claim 10 further comprising the steps of:

monitoring how many and/or which of the customers that were provided marketing ~~material information~~ about the product actually purchased the product from ~~[[a]] their representative of the business.~~

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12. (Currently Amended) A method according to claim 11 further comprising the steps of:

determining a marketing project efficacy indicator for the marketing project by examining which of the customers that were provided with marketing material ~~information~~ about the product actually purchased the product.

13. (Currently Amended) A method according to claim 12 wherein the marketing project efficacy indicator is determined by comparing the number of customers that were provided marketing material ~~information~~ with the number of those customers that were provided marketing material ~~information~~ that actually purchased the product from a representative of the business.

14. (Original) A method according to claim 11 further comprising the step of:
determining common characteristics for those customers that actually purchased the product from a representative of the business.

15. (Currently Amended) A method according to claim 10 further comprising the steps of:

monitoring how many and/or which of the customers that were provided marketing material ~~information~~ about the product did not purchased the product from ~~[[a]]~~ their representative of the business.

16. (Currently Amended) A method according to claim 15 further comprising the steps of:

determining a marketing project efficacy indicator for the marketing project by examining which of the customers that were provided with marketing material ~~information~~ about the product did not purchase the product.

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17. (Currently Amended) A method according to claim 16 wherein the marketing project efficacy indicator is determined by comparing the number of customers that were provided marketing material ~~information~~ with the number of those customers that were provided marketing material ~~information~~ that did not purchased the product from a representative of the business.

18. (Original) A method according to claim 15 further comprising the step of:
determining common characteristics for those customers that did not purchase the product from a representative of the business.

19. (Currently Amended) A method according to claim 10 wherein the business is a financial services business, the method further comprising the steps of:
generating the marketing material;
checking the marketing material for compliance with applicable rules and regulations, thereby resulting in compliant marketing material;
providing the compliant marketing material, as well as the customized ~~at least partial~~ listing of selected customers, to each of the one or more of the representatives that received a customized listing.

20. (Currently Amended) A method according to claim 10, wherein the ~~at least partial~~ customized listing of the selected customers is provided to ~~the one or more~~ each of the representatives that received a customized listing in a format that is compatible with printing labels.

21. (Currently Amended) A method according to claim 10, wherein the ~~at least partial~~ customized listing of the selected customers is provided to ~~the one or more~~ each of the representatives that received a customized listing in a format that is compatible with printing envelopes or post cards.

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22. (Currently Amended) A method according to claim 10, wherein the ~~at least partial~~ customized listing of the selected customers is provided to ~~the one or more~~ each of the representatives that received a customized listing in a format that is compatible with a merge function of an application program.

23. (Currently Amended) A method according to claim 10, wherein the ~~at least partial~~ customized listing of the selected customers is provided to ~~the one or more~~ each of the representatives that received a customized listing in a format that is compatible with a spreadsheet application program.

24. (Currently Amended) A method according to claim 10, wherein the ~~at least partial~~ customized listing of the selected customers is provided to ~~the one or more~~ each of the representatives that received a customized listing in a format that is compatible with an e-mail program.

25. (Currently Amended) A method for marketing a product to customers of a business, wherein the business has a number of representatives, and each representative represents a portion of the customers, the method comprising the steps of:

providing a customer database for storing information about the customers of the business;

providing a marketing project having a number of marketing project parameters;

applying the number of marketing project parameters against the information in the customer database to identify selected customers;

providing a notice announcing the marketing project ~~at least a partial listing of the selected customers~~ to one or more of the representatives;

at least some of the representatives reviewing the notice and requesting a customized listing that includes a listing of the portion of the selected customers that are represented by the representative ~~providing information about the product to at least some of their customers listed on the at least partial listing; and~~

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determining a marketing project appeal indicator by monitoring how many representatives reviewed the notice and requested a customized listing
~~identifying those customer that were provided with information about the product;~~
~~identifier those customer that actually purchased the product; and~~
~~determining a marketing project efficacy indicator for the marketing project by examining which of the customers that were provided with information about the product actually purchased and/or did not purchase the product.~~

26. (Currently Amended) A method according to claim 25 wherein the customized at ~~least partial~~ listing of selected customers is provided to one or more of the representatives upon initiation by the representative.

27. (Canceled)

28. (Currently Amended) A method according to claim ~~[[20]]~~ 25 further comprising the step of:

making a~~[[n]]~~ contact entry in the customer database when a representative contacts a customer about the product; and

determining a marketing project appeal indicator by monitoring the contact entries in the customer database.

29. (Currently Amended) A method according to claim ~~[[25]]~~ 25 wherein the customized at ~~least partial~~ listing of the selected customers that is provided to a particular representative only includes customers that the particular representative represents.

30 ~~[[29]]~~. (Currently Amended) A method according to claim 25 wherein an identifier for each customer that actually purchased the product is generated by having each representative initiate the recording of each sale of the product in the customer database.

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31. (New) A method for marketing a product to customers of a business, wherein the business has a number of representatives, and each representative represents particular ones of the customers of the business, the method comprising the steps of:

generating marketing material;

checking the marketing material for compliance with applicable rules and regulations, thereby resulting in compliant marketing material;

providing a customer database for storing information about the customers of the business;

providing a number of marketing project parameters;

applying the number of marketing project parameters against the information in the customer database to identify selected customers;

providing the compliant marketing material and a customized listing of the selected customers to at least some of the representatives; and

at least some of the representatives providing the compliant marketing material to at least some of the customers listed on their customized listing of selected customers.

32. (New) A method according to claim 31, wherein the rules and regulations are related to a particular product.

33. (New) A method according to claim 31 further comprising the steps of:
monitoring how many and/or which of the customers that were actually provided marketing material about the product actually purchased the product from their representative.

34. (New) A method according to claim 33 further comprising the steps of:
determining a marketing project efficacy indicator for the marketing project by comparing the number of customers that were actually provided marketing material with the number of those customers that were actually provided marketing material that actually purchased the product from their representative.

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35. (New) A method according to claim 31 further comprising the step of:
determining common characteristics for those customers that actually purchased the
product from their representative.